

## **INSTRUCTIONS FOR USING IDEAS TO ENTER COOPERATIVE AGREEMENTS, GRANTS, AND CHALLENGE COST SHARE AGREEMENTS**

**Program Offices.** Beginning October 1, 2003, all program office staff who prepares requisitions for Cooperative Agreements (CA), Grants, and Challenge Cost Share (CCS) Agreements will use the following Bureau of Land Management (BLM) standard business practices:

**Requisitions.** All requirements for the establishment of CAs, Grants, and CCS Agreements will be prepared on a requisition form using the Interior Department Electronic Acquisition System (IDEAS) Program. Requisitions will also be prepared to modify existing agreements or to modify requisitions that were previously submitted to the Procurement Office for processing, regardless of the dollar amount.

**Supporting Documents.** Supporting documents [e.g., Statements of Programmatic Involvement (SPI), Statements of Work] will be saved in the IDEAS Program as an attachment to the requisition.

**Requisition Approvals.** Supervisor and Budget Office approval must be applied using the IDEAS approval function for each requisition that is submitted to the Procurement Office for processing. Additional approvals (e.g., Property Management, Information Technology, or Finance approval) must be applied and obtained, if they are applicable.

**Acquisition Offices.** Beginning October 1, 2003, all Acquisition staff and Assistance Officers will use the following standard business practices when preparing awards for CAs, Grants, and CCS Agreements.

**CAs, Grants, and CCS Agreements.** The IDEAS Program will be used to process all new CA, Grant, and CCS Agreement awards (including task orders). Optional Form (OF) OF-347, Order for Supplies or Services, will be used to establish the obligation in the Federal Finance System (FFS) using the BLM Document Identification Numbering System (DINS). The OF-347 will be completed using the guidance in Table 1 below. Standard Form (SF) SF-30, Amendment of Solicitation Modification of Contract, will be used for issuing modifications to these awards. The initial agreement or grant prepared in word processing will be saved in IDEAS as an attachment to the OF-347.

Existing CAs, Grants, and CCS Agreements (including Task Orders and Modifications) previously issued outside of the IDEAS Program are exempt from this requirement. New modifications to these awards that are issued after October 1, 2003, are also exempt from this requirement.

New Task Orders issued against existing agreements after October 1, 2003, must be entered and obligated through IDEAS. The master agreement related to these Task Orders must also be entered (including related modifications) into IDEAS to enable the new Task Orders to be submitted to Electronic Commerce (EC). The initial agreement and related modifications should be entered into IDEAS using the minimum data listed in Table 1. The Contracting/Assistance Officer approval should be applied. Do not use

or apply the Finance approval. Release and issue the award after the Contracting Office (CO) or Assistance Officer approval is applied. All CAs, Grants, and CCS Agreements entered into IDEAS will be submitted to the Department of the Interior Electronic Commerce (DOI-EC) website. Old agreements awarded prior to October 1, 2003, must also be submitted to DOI-EC, if the agreement is still active, and new Task Orders will be issued after October 1, 2003.

**CA, Grant, and CCS Reviews.** The Statement of Programmatic Involvement (SPI) and the Instrument Selection Determination (ISD) will be routed to the Chief of the Contracting Office for review and approval. If the agreement will exceed \$100,000 over the life of the agreement, the SPI and ISD must be routed to the Washington Office Agreements Team Cabinet (WO-850) for review and approval.

**Reporting.** The CAs, Grants, and CCS Agreements will be reported in the Federal Assistance Award Data System. Do not report these awards in Federal Procurement Data System.

**Loading Initial CAs, Grants, and CCS Agreements.** All new awards must be entered into IDEAS. Existing agreements and grants awarded outside the IDEAS Program must also be entered into IDEAS if new task orders will be issued during the life of the award.

Optional Form OF-347 will be used to create the initial award for CAs, Grants, CCS Agreements, and related Task Orders. Standard Form (SF-30) will be used to create modifications to initial awards and task orders. The initial agreement or grant prepared in word processing will be saved in IDEAS as an attachment to the OF-347.

Table 1 provides guidance on the minimum data fields to be completed on form OF-347.

<b>TABLE 1</b> <b>Minimum Fields To Complete On Form OF-347</b> <b>CAs, Grants, and CCA Agreements</b>		
<b>Field Number</b>	<b>Description</b>	<b>Notes</b>
1	Date of Order	
2	Contract Number	If issuing a task order against an existing agreement. Must use DINS numbering system.
3	Order Number	Agreement Number or Task Order Number. Must use DINS numbering system.
4	Requisition Number	Number automatically assigned when requisition is associated with award document.
5	Issuing Office	
6	Delivery Address	This field is completed in the Line Item Detail Screen.

<b>TABLE 1</b> <b>Minimum Fields To Complete On Form OF-347</b> <b>CAs, Grants, and CCA Agreements</b>		
<b>Field Number</b>	<b>Description</b>	<b>Notes</b>
7	Name/Address of Recipient	Recipient must be entered in the IDEAS Vendor Maintenance Table.
8	Type of Order	
9	Accounting & Appropriation Data	This field is completed in the Contract Level Funding, Line Item Summary.
15	Delivery Date	This field is completed in the Line Item Detail Screen.
16	Discount Terms	If applicable
One Line Item, including the following Line Item Detail Fields	Delivery Date	Delivery date must match ending date under period of performance. The delivery date must match the end date under the period of performance.
	Period of Performance (Start/End Date)	The end date must match the date that is entered in the delivery date field above.
	Description	
	Extended Description	
	Quantity	
	Unit/Unit of Issue	
	Unit Price	
	Line Item Cost	
	Product Service and NAICS Code	SIC code is not required.
	Delivery Address	
	Invoice Address	
Contract Level Funding		
21	Invoice Mailing Address	This field is completed under the address tab, Line Item Detail Screen.
23	Assistance Officer Name	

**Approvals.** Table 2 provides guidance on the type of Federal Financial System (FFS) approvals that will be used for CAs, Grants, and CCS Agreements. Contracting Officer/Assistance Officer approval must be applied before processing the finance approval.

<b>Table 2</b> <b>FFS Approval Types for Use With CAs, Grants, and CCS Agreements</b>		
<b>FFS Trans Code</b>	<b>Description</b>	<b>IDEAS Approval Template</b>
G\$	ASAP Agreements & Grants	Finance (ASAP Agreements & Grants)
A\$	Agreements & Grants – Not ASAP	Finance (Agreements & Grants Not ASAP)